## fibrecrm HEART OF THE PRACTICE

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## **Bulk Update Records**

Bulk updating records can be really handy – if a colleague • is leaving your firm, you can mass update all of their clients and assign them to another colleague/user. To **Bulk Update** navigate to the module where the records you are updating are and use the **Search Filter** to find the records you wish to update. For this example we'll be using the Organisations module.

	CONTACTS	OPPORTUNITIES	MARKETING	ACTIVITY	AUTOMATIO
+ Create Organisation	⊲				
View Organisations		ORGANI	SATION	S	
Import Organisation	s	Clie	nt ID	Name 🔶	
Onboarding View		D- BULK AG	CTION - My Fi	lters 🔽 🟹 102 Jermyn S	Street

2. Once you've found the records. Use the check boxes on the left hand side to select. Or use the drop down arrow box to Select All.

0			102 Jermyn Street
0	KG	ANISA	TIONS
		Client ID	🗦 🛛 Name 🔶
0.	Selec	ted:3 B	ILK ACTION 👻 My Filters 🔻 🔻 🗮
Select This Page (75) Select All (2321)		This Page (75)	102 Jermyn Street
			126 St John's Hill
		All (2321)	1859 Capital
Deselect All			1st Western Travel
		ct All	240 Blackfriars Road Limited Partnership
~	1	2SAL012	2nd Sales Ltd
~	1	4GRE91	4th Great Western
		M625	Auddus

Once selected select **Mass Update** in the **Bulk Action** drop down menu.

ORGANISATIONS



4. Scroll down the selected records page to find the Mass Update form below. Here you can make your updates such as changing the Assigned User, Customer Grade or Client Type. Once you've made all the changes you wish select Update.

Mass Update			
Assigned User:	ĸ	Type:None	
Industry:	None	Billing County: None	<b>V</b>
RO State:	None	Customer Feedback Score None	
Business Type	None	Update via ETL.	
Last Touch date	(dd-mm-yyyy)	Period Ending	
Year End Month	None	Client Since	
Organisations	K	Business Sub Type None	
Customer Grade	None	Accounts Software	
Audit	None	Client Type None	
Introducer Grade	introducer_grade	Ltd Co Type list	
Update All	(dd-mm-yyyy)	Yr End	
Opt out Primary Email	None		
Security Groups: Mass Assign	ASSIGN REMOVE Group:None	<b>7</b>	
	up box will	David - Para da	
• A pop • then a	ppear select demo f	brecrm.cloud savs	
• A pop • then a • the confi	rm the	brecrm.cloud says	